North Carolina COVID-19 Vaccine Management System (CVMS)

CVMS Provider Portal

Manage Appointment Scheduling User Guide

Version 1

March 12, 2020

NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

If you have any questions, issues or requests, please go to the

CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 8. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code
   NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)
   For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
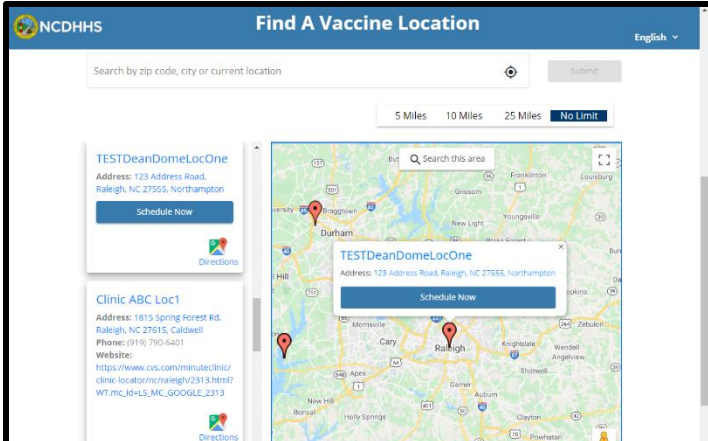3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

NC DEPARTMENT OF
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Overview

Overview

The scheduling feature in CVMS is optional. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment and register in CVMS altogether. You will then be able to schedule their 2nd dose appointment the day of their 1st dose appointment.

Note that these **appointments slots will be made available to the general public**. Therefore, this feature will NOT fit your needs if you vaccinate only a selected population group (e.g., long-term care facility, prison).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:
- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

Additionally, you will need to:
- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at https://covid-vaccine-provider-portal.ncdhhs.gov with your NCID username and password

Now, let's get started!

Appointment Scheduling Overview

The Appointment Scheduling process enables Healthcare Location Managers to adjust schedule availability and publish public-facing appointment slots on MySpot.nc.gov.

1

If you wish to use the scheduling feature in CVMS for your location, please submit a ticket via the CVMS Help Desk Portal at (*https://ncgov.servicenowservices.com/csm_vaccine*) to request this feature.
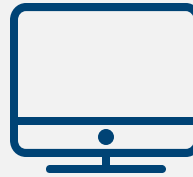
2

Once activated, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose appointments.

3

Set your weekly availability to receive appointments.

Update the number of first-dose appointments you can receive regularly.

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CVMS Scheduling Key Terms

Appointments Per Time Window	The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.
Available Date*	This date indicates when the location appears on the Vaccine Site Locator to begin booking future appointments.
Start Date*	First day the location will show available appointment slots on the Vaccine Site Locator website (https://MySpot.nc.gov).
Closing Date	Last day the location will show available appointment slots on the Vaccine Site Locator website. If it is your primary location, select a date in the far future to avoid being delisted or leave it blank.
Vaccine Supply	The Vaccine (Appointment) Supply record is the number of appointments that are made available.
Current Stock	The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won't display available slots.
Date of Stock Count	Date of creation of the Vaccine Supply Record. Once created, **do not edit this date.**
Dose Number	Create two vaccine supply records for 1st and 2nd dose. Use this field to identify if this vaccine supply includes 1st dose or 2nd dose vaccine.

* This definition only applies to locations that are using the scheduling feature in CVMS

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Enable the Scheduling Feature in CVMS

Activate the Scheduling Feature

Enable Scheduling for your Location

Once your Location has submitted a request through the CVMS Help Desk Portal and your Healthcare Location Manager has attended a training session, the scheduling feature will be activated. The **LOCATIONS** tab will enable your Location Managers to add and manage appointments, and recipients to self-schedule their first dose appointments.

1
- Request the scheduling feature in CVMS through the CVMS Help Desk Portal

2
- Attend CVMS Training Session **CVMS Provider Portal 203 – Managing Appointment Scheduling**

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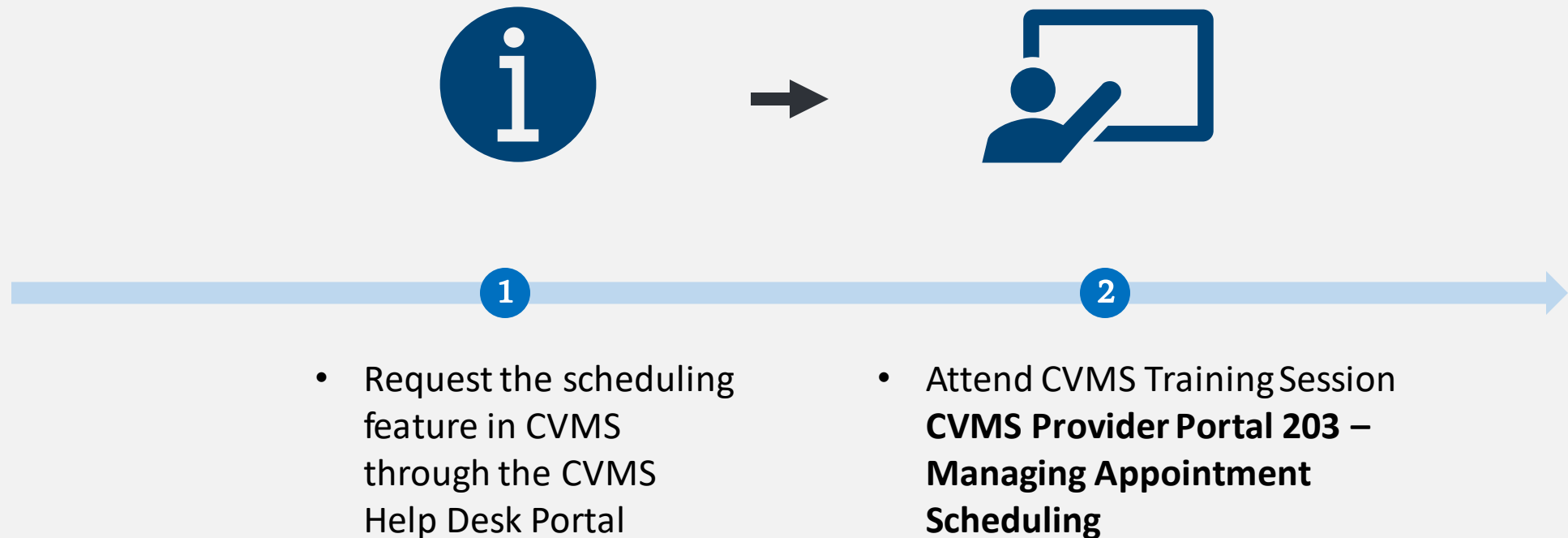
Request the Scheduling Feature via the CVMS Help Desk Portal

1. **LOG IN** the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine (see page 2 for instructions on logging in)
2. Select **VACCINE PROVIDER**
3. Submit a ticket requesting to activate the scheduling feature in CVMS for your location(s)

Audience

> **Healthcare Location Manager**

Enable Scheduling for Your Location

Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab

Step 2 of 4: Select the Location

1. Click on the **LOCATION NAME** for which you wish to enable scheduling using CVMS

Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

1. Click **EDIT**

Audience

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Location Manager

Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

The **CVMS Scheduling** checkbox indicates that this location will use the scheduling feature in CVMS. Note that if your request to enable the scheduling feature has not yet been approved, you will be unable to activate scheduling for this location.

1. To activate the scheduling feature in CVMS, check the **CVMS SCHEDULING** box
2. Click **Save**

Audience

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Tips

You may activate the scheduling feature in CVMS at any time if your request to enable the scheduling feature has been approved.

Create your Two Vaccine Supply Records

The scheduling feature in CVMS requires you to maintain two vaccine (appointment) supply records: one record for the first-dose appointments and a second record for the second-dose appointments (if applicable).

However, once created, you will just need to maintain the first-dose appointment vaccine supply record if you follow these instructions.

1. Navigate to the **LOCATIONS** tab

2. Click on the location name hyperlink

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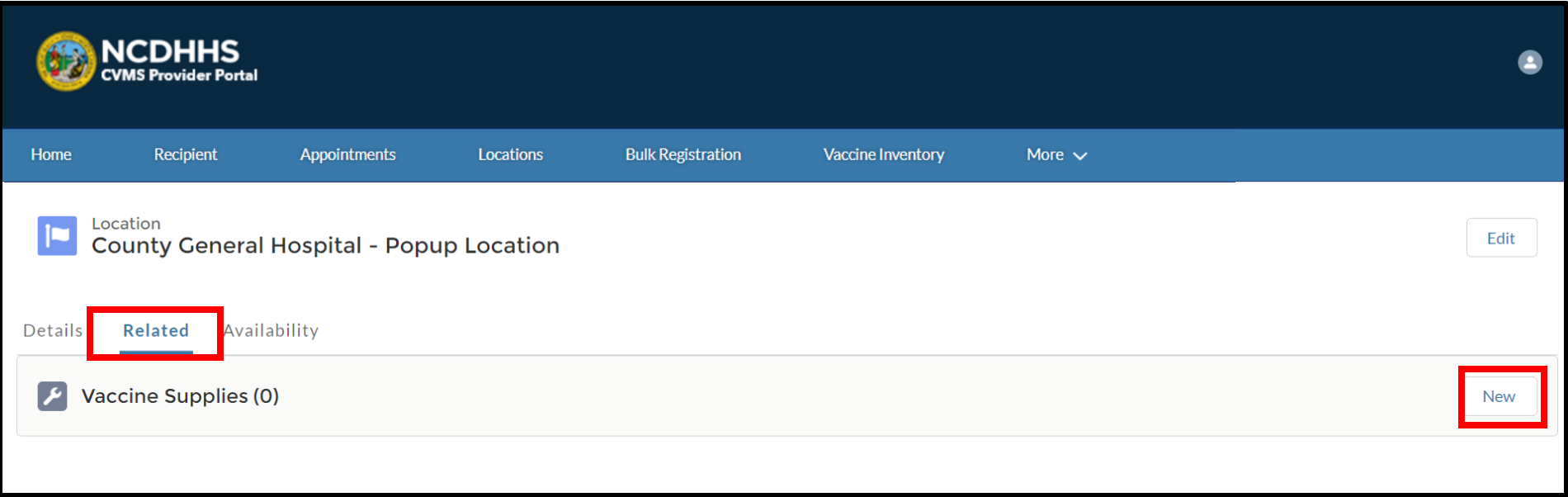# Step 2 of 8: Click 'New' to Create your Two Vaccine Supply Records

1. Click the **RELATED** tab

2. Click **NEW**

Audience

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Tips
If you already have created your two vaccine supply records, edit the existing record and do not create a new one.

Step 3 of 8: Create your 1st Dose Vaccine Supply Record

A **NEW VACCINE SUPPLY** pop-up window will appear.

1. In the **VACCINE** field, select the generic vaccine record **VAX-0000**

2. In **CURRENT STOCK** enter the number of appointment slots you wish to release

     Note: If you do not know how many appointment slots to release yet, enter 0

3. Select today's date for **DATE OF STOCK COUNT**

4. In **DOSE NUMBER**, select **1**

5. Click **SAVE & NEW**

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Tips
Vaccine Supply in this instance means "Appointment" Supply.

Set Current Stock to equal the number of first-dose appointments you want to make available for that location between the **START DATE** and **CLOSING DATE**.

New Vaccine Supply

Information

Name

Location
Clinic Location1 - Community Vaccination Event ✕

Vaccine ⓘ
VAX-0000 ✕

Dose Number
1 ▾

Current Stock
1,000

Date of Stock Count
3/22/2021

System Information

Owner
Simon Couderc

Cancel   Save & New   Save

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20

1. In the **VACCINE** field, select the generic vaccine record **VAX-0000**

2. In **CURRENT STOCK** enter a random large number of appointments (e.g., 1,000,000)

   Note: When recipients have received for their first-dose appointment, you will be able to schedule their second-dose appointment (if applicable). Therefore, we do not need to maintain the number of second-dose appointments to be released in the system because this number cannot exceed your number of scheduled first-dose appointments.

3. Select today's date for **DATE OF STOCK COUNT**

4. In **DOSE NUMBER**, select **2**

5. Click **SAVE**

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Tips
Once created, you will not need to maintain this record.

New Vaccine Supply

Information

Name

Location
Clinic Location1 - Community Vaccination Event

Vaccine
VAX-0000

Dose Number
2

Current Stock
1,000,000

Date of Stock Count
3/22/2021

System Information

Owner
Simon Couderc

Cancel Save & New Save

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21

Publish Appointment slots using the Scheduling Feature in CVMS

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Set Weekly Location Schedule for Dose 1 and Dose 2 appointments

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

1. Click on the **LOCATION TAB**

2. Click on the **LOCATION NAME** hyperlink

Each vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

1. Click on the **AVAILABILITY TAB**

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Tips

All previously scheduled appointments will be unaffected by updates to the vaccination schedule.

Step 3 of 8: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 15 minutes). The time window duration applies to all appointments. Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location.

1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location

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First dose appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Review the **START DATE** and update if needed (first date the site will offer available appointments to book on the Vaccine Site Locator website)

2. Review the **CLOSING DATE** and update if needed (last date that the site will offer available appointments to book on the Vaccine Site Locator)

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Tips

You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.

Second dose appointments will be available for booking by you to schedule appointments for recipients after the minimum period between 2 doses (if applicable). See the Addendum for CVMS Scheduling Feature User Guide for additional instructions at https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers.

The **AVAILABLE DATE** indicates when available appointment slots will be offered to recipients. By having the available date before the start date, It will allow recipients to start scheduling appointments in advance.

1. Enter **AVAILABLE DATE**

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28

Step 6 of 8: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for first dose appointments and second dose appointments.

1. Check the checkbox for each day you will administer vaccinations at this location

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Tips

Unselected days will not be open to appointments.

For each open day you will need to set the **OPENING HOURS** per time window. You can have multiple time windows within the same day. To add another time window, click on the three dots on the right and select **ADD ANOTHER TIME** For each time window, enter three pieces of data: start time, end time, and **APPOINTMENTS PER TIME WINDOW**. Appointments per time window is the number of people you can vaccinate at the same time.

1. Enter the **OPENING HOURS**

2. Enter the **APPOINTMENTS PER TIME WINDOW**

3. If needed, click on the three dots, and select **ADD ANOTHER TIME**

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Tips

Do not check the **ALL DAY** checkbox as this will allow appointments to be scheduled over a 24-hour period.

You may not enter a time twice on the same day (e.g. a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).

Step 8 of 8: Finalize Schedule

You have now created a schedule for your location.

1. **REVIEW** the schedule for the location

2. Click **SAVE**

Congratulations! You have now finalized the schedule for your location!

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Tips

The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.

Caution on Non-Regular Events

Schedules are set on a weekly basis. The current settings do not allow you to easily accommodate non-regular situations. Examples of non-regular situations are holidays or exceptional closing days. The only way to cover them would be to edit your schedule.

Example: If you are not open next Wednesday, you will need to unselect Wednesday. The moment you click Save, there will be no availability on any upcoming Wednesdays that are published. Also, if a recipient already scheduled an appointment for that day, you would need to cancel and reschedule that appointment.

We know this might be a bit of a challenge. Please understand this is the first release of the scheduling feature in CVMS and our development teams are working on adding holidays and other improvements.

Add and Edit Number of Appointments

Setting Vaccine Supply

"Vaccine (Appointment) Supply" is what sets the total number of <u>first dose</u> appointments available

- Set 1st dose Vaccine Supply to equal the number of 1st dose appointments you want to make available <u>for that location</u>

- It does NOT need to be the same as your total inventory on hand.

  → If you need to hold back doses (e.g. set aside for a planned event, Historically Marginalized Population outreach), do not include those in the "Vaccine Supply"

- You should only release the number of First-Dose appointments you are able to cover with your doses

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Step 1 of 4: Edit your 1st Dose Vaccine Supply Record

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1st Dose appointments released in the system.

1. Navigate to the **LOCATIONS** tab

2. Click on the location name hyperlink

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Step 2 of 4: Select your 1st Dose Vaccine Supply Record

1. Click on **RELATED**

2. Click on the **DOSE 1 VACCINE SUPPLY** record name

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Step 3 of 4: Edit your 1ˢᵗ Dose Vaccine Supply Record

1. Click on the **EDIT** button

Audience

> Healthcare
> Location Manager

1. Update the **CURRENT STOCK** amount to increase or decrease the number of 1ˢᵗ dose appointments offered

   Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments.

   For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**

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Tips

There is no correlation between Vaccine Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1ˢᵗ and 2ⁿᵈ doses.

The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

Recommendations

SCENARIO 1
ADD NEW VACCINE APPOINTMENTS

You may receive additional allocation, draw extra doses of the vaccine, or wish to offer additional appointments from your reserve supply. In this case, you can offer additional appointments to the public.

1 Calculate the new current stock quantity by adding to the Current Stock the amount of additional appointment slots you wish to allow

2 Update Current Stock of your 1st Dose Vaccine Supply record with the new amount once you are ready to offer the additional appointments. The additional appointments will be offered immediately so be sure not to increase the Current Stock before the additional vaccine is on-site.

SCENARIO 2
TOO MANY APPOINTMENTS WERE RELEASED

If you realize you will not have vaccine inventory or capacity to allow as many appointments as you estimated AND if these appointments were not yet scheduled, you can edit your supply and just decrease the current stock to the amount of appointments you can accommodate.

1 Calculate the new current stock quantity by subtracting from the Current Stock value the amount of appointment slots you wish to remove

2 Update Current Stock with the new decreased amount

If appointments were already scheduled that you do not have the supply to complete, you may need to cancel overbooked appointments.

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To avoid mistakes:

- Only create the two VACCINE SUPPLY RECORDS for 1st dose and 2nd dose. Do not create additional VACCINE SUPPLY records.

- Do not update the DATE OF STOCK COUNT.

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Scheduling from the Perspective of a Recipient

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Scheduling from the Perspective of a Recipient
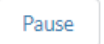
Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.

1 RECIPIENT IDENTIFIES **VACCINE LOCATION ON THE VACCINE SITE LOCATOR WEBSITE (**MYSPOT.NC.GOV)

2 RECIPIENT CLICKS ON **SCHEDULE APPOINTMENT**

3 RECIPIENT ANSWERS **ELIGIBILITY QUESTION**

4 RECIPIENT SELECTS AN **APPOINTMENT SLOT**

5 RECIPIENT ENTERS **PERSONAL DETAILS**

6 RECIPIENT RECEIVES **CONFIRMATION NUMBER**

↑ RECIPIENT AND APPOINTMENT **APPEAR IN CVMS**

X RECIPIENT CAN **CANCEL** APPOINTMENT IF NEEDED

Appendix

Additional Notes

Key Items:

- **Hyperlink**s appear as light blue and will provide additional information or navigation.

- *** Asterisks** are used to denote required information.

- A Toggle can be clicked to see selectable options.

- A Pen can be clicked to make edits to the field.

- Previous Next Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.

- Pause A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:
- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:
- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see **https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5**
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

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User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	03/12/2021	• Initial document	61	Kevin Kauffman, Kechia Scott, Kristin Clark